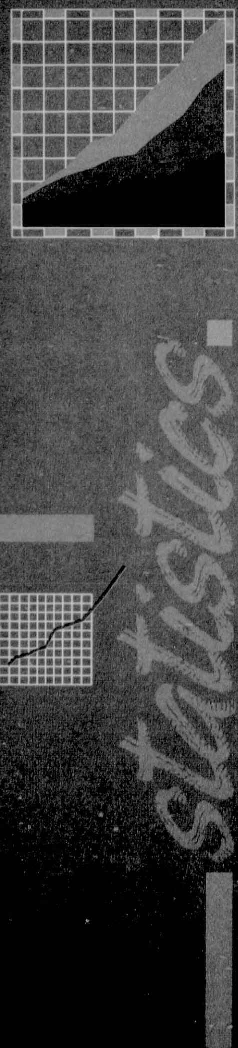
Australian Bureau of Statistics

Statistics Weekly

Thursday, 3 May 1990



The week in statistics ...

IAN CASTLES
Australian Statistician

Competition in manufacturing industry

More than half the turnover of Australia's manufacturing industry in 1987-88 was produced by less than one per cent of all enterprise groups engaged in manufacturing.

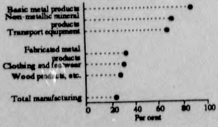
There were 26,547 enterprise groups in Australian manufacturing operating at 30 June 1988. Of these, the largest two hundred (measured by value of manufacturing turnover) accounted for 41 per cent of employment, 47 per cent of wages and salaries and 56 per cent of turnover in the manufacturing sector in 1987-88.

The table below indicates that (in terms of turnover) there has been little change in the degree of concentration in the overall manufacturing sector during the ten years to 1987-88.

MANUFACTURING INDUSTRY CONCENTRATION
Percentage contribution to turnover of largest enterprise groups

Enterprise groups	*1977-78*	*1982-83*	*1987-88*
4 largest	9	10	9
20 largest	21	24	23
200 largest	55	58	56

INDUSTRY CONCENTRATION, 1987-88
Contribution to turnover of 20 largest enterprise groups

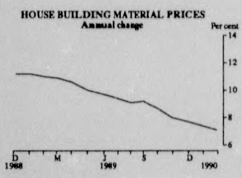


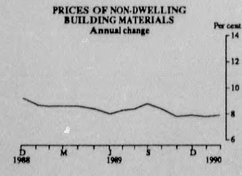
There are marked differences in concentration between industries within the manufacturing sector. The chart at left shows the manufacturing subdivisions, of which there are twelve in total, with the three highest and three lowest concentration ratios. It shows, for example, that the twenty largest enterprise groups operating in the basic metal products industry accounted for 87 per cent of that industry's turnover.

The above information comes from the recently released publication *Manufacturing Industry, Concentration Statistics, Australia, 1987-88* (8207.0). The statistics presented in that publication provide data on the extent to which the largest enterprise groups predominate in each of the 173 individual industries in the manufacturing sector, and are an aid in assessing the degree of competition existing among enterprises operating in those industries.

For further information, order the publication Manufacturing Industry, Concentration Statistics, Australia *(8207.0), or contact Mel Moses on (06) 252 5640.*

Small increase in prices of building materials





Prices for building materials increased in February 1990, with both house building materials and those used in other forms of building increasing by 0.4 per cent.

The main price increases in February for house building materials were for aluminium windows and doors, and toilet suites.

For materials used in other buildings, the main price increases were for air conditioning, structural steel, builders' hardware, and conductors.

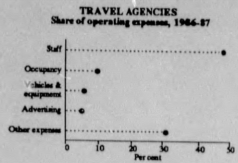
Over the year to February 1990, prices for house building materials increased by 7.1 per cent and prices for materials used in other buildings increased by 7.9 per cent. In the case of materials used in house building, this annual rate continued a downward trend evident since October 1988. For materials used in building other than houses, the annual rate of increase has been relatively stable for the past four months.

PRICES OF BUILDING MATERIALS, FEBRUARY 1990
Percentage change

	House building		Other than house building	
City	*From previous month*	*From corresponding month of previous year*	*From previous month*	*From corresponding month of previous year*
Sydney	0.4	7.4	0.4	7.9
Melbourne	0.4	6.0	0.5	7.6
Brisbane	0.5	8.5	0.1	9.5
Adelaide	0.4	7.2	0.5	7.5
Perth	0.6	8.5	0.3	7.8
Hobart	0.0	5.8	0.4	5.1
Weighted average of six State capitals	*0.4*	*7.1*	*0.4*	*7.9*
Darwin	not available		0.4	5.9
Canberra	0.5	7.8	0.6	8.0

For further information, order the publications Price Index of Materials Used in House Building *(6408.0) and* Price Index of Materials Used in Building Other Than House Building *(6407.0), or contact Peter Sturgeon on (06) 525 6198.*

Travel agency industry



Recently released findings from the ABS survey of the travel agency services industry provide a broad snapshot of the industry's size and structure in 1986-87.

A significant finding was that the industry as a whole made a small loss ($200,000) in 1986-87, with the largest businesses faring worse than the small businesses which predominate in the travel agency industry.

The nineteen largest firms in the industry, employing almost 4,300 people (an average of 225), together made a loss of over $12 million. Only four of these firms made an operating profit in 1986-87.

Foreign controlled enterprises accounted for 22 per cent of turnover in the industry in 1986-87. Although only thirty six of the 1,500 enterprises in the industry were foreign controlled, they also accounted for 17 per cent of employment.

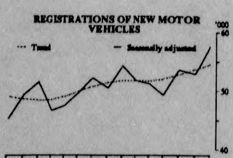
The statistics also show that the industry:

- employed over 11,600 people (70% female),
- had staff costs amounting to almost half total operating expenses, and
- generated turnover (mostly commissions) of almost $430 million in 1986-87 from:
  - — international travel (67%)
  - — domestic travel (23%)
  - — other income (10%).

The survey found that travel agents' business is strongly centred in NSW, with almost half of both employment and turnover occurring in that State.

For further information, order the publication Travel Agency Services Industry, Australia *(8653.0), or contact Peter White on (06) 252 5633.*

Special factors boost car registrations



New motor vehicle registrations increased by 8.8 per cent to 57,566 in March after seasonal adjustment. Cars and station wagons rose by 12.1 per cent to 46,424 while all other vehicles fell by 2.9 per cent to 11,142.

However, the figures for March are affected by delayed processing of registrations as a result of an industrial dispute in February. In view of this, recent months should be considered together.

Continued ...

The March registrations were the highest for that month since 1985 and followed similar high recordings in January and February. The trend estimate increased by 1.6 per cent from February, continuing the rise over the last four months.

It is reported that part of the overall rise in registrations in the first quarter of 1990 resulted from the strong promotional campaign conducted by car makers to lift their production levels above those required by the Federal Government as part of its plan for the Australian industry. The figures were also influenced by marked increases in the purchase of cars costing more than the $42,910 luxury limit, following the announcement that the Federal Government would levy an extra 20 per cent sales tax on them from 1 May.

For further information, order the publication Registrations of New Motor Vehicles, Australia, Preliminary *(9301.0), or contact David Ketley on (06) 252 5459.*

Sheep farms on the increase

NUMBER OF AGRICULTURAL ESTABLISHMENTS
Annual change to March 1989

The number of establishments in the sheep industry rose 13.3 per cent to 25,206 in the year to 31 March 1989.

The proportion of all agricultural establishments engaged in the sheep industry has increased each year since 1985.

Overall, the number of establishments with agricultural activity fell by 0.6 per cent to 126,551 in the year, with sheep the only agricultural industry to show a significant rise in establishments.

The biggest fall in establishments among the major industries was in cereal grains, down 14.5 per cent to 7,071.

Other significant falls were recorded in the cotton industry, down 25.2 per cent to 469 establishments, and the peanut industry, down 42.9 per cent to 197. In the latter case, growers left the industry largely because of continuing poor growing seasons and high operating costs.

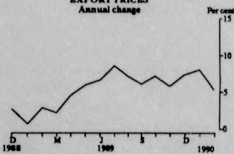
For further information, order the publication Agricultural Industries, Structure of Operating Units, Australia *(7102.0), or contact Henry Stefanik on (06) 252 5347.*

Export prices continue to rise

Export prices rose by 1.0 per cent in February 1990. The February increase followed an increase of 0.3 per cent in January, which halted a five-month downward slide in the index to the end of 1989.

Approximately 55 per cent of the items in the index recorded price increases in February 1990 with the main factor underlying the increase in prices being the weakening of the Australian dollar against most of the major trading currencies. The main increases were for alumina (reflecting renegotiated contracts), wheat and coal. Twenty eight per cent of the items included in the index recorded price decreases, with the main decreases being for beef (reflecting lower prices in the USA), sugar and nickel.

EXPORT PRICES
Annual change



Despite the recent monthly increases, export prices rose by just 5.4 per cent over the year to February 1990, the lowest annual rate of increase since April 1989.

As the table below shows, the longer term movement in export prices has varied markedly between commodity groupings. The one per cent February rise in export prices of chemicals and other manufactured goods was the first monthly rise in that index since August 1989.

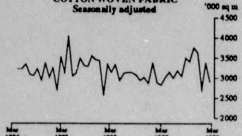
EXPORT PRICES, FEBRUARY 1990
Percentage change

Commodity	*From previous month*	*From corresponding month of previous year*
Food and live animals	−1.3	13.9
Crude materials	1.9	−0.8
Mineral fuels	2.2	26.9
Animal and vegetable oils	−7.8	−10.0
Chemicals and other manufactured goods	1.0	−1.7
All exports	*1.0*	*5.4*

For further information, order the publication Export Price Index, Australia *(6405.0), or contact Peter Cordy on (06) 252 5541.*

Manufacturing output — falls again outnumber rises

MONTHLY PRODUCTION OF COTTON WOVEN FABRIC
Seasonally adjusted



Thirteen of the twenty-five seasonally adjusted categories covered by the monthly survey of manufacturing production showed falls in March, while only twelve showed rises. Falls have now outnumbered rises for two months in a row.

The major falls occurred in the production of cotton woven fabric (– 13.7%), woollen woven fabric (– 10.9%) and sulphuric acid (– 10.4%).

The largest percentage increases in manufacturing output in March came in rotary type petrol lawn mowers (52.9%), blooms and slabs from rolling and forging of iron and steel (23.1%) and confectionery (chocolate based 18.5% and other 21.3%).

PRODUCTION OF COMMODITIES RECORDING SIGNIFICANT MONTHLY CHANGE
Seasonally adjusted

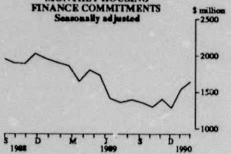
Commodity	*Unit*	*Production in March 1990*	*Percentage change from previous month*
Decrease —			
Cotton fabric	'000 sq m	2912	– 13.7
Woollen fabric	'000 sq m	658	– 10.9
Sulphuric acid	'000 tonne	127	– 10.4
Increase —			
Lawn mowers	'000	27.7	52.9
Blooms and slabs	'000 tonne	175	23.1
Confectionery:			
Chocolate based	tonne	7973	18.5
Other	tonne	5830	21.3

Thirteen of the twenty-six categories for which original data are available for both March 1989 and March 1990 showed decreases over the twelve months, while twelve recorded rises and one remained unchanged.

For further information, order the publication Production Statistics, Australia, Preliminary *(8301.0), or contact Kevin Squair on (06) 252 5558.*

Home loans up two months in a row

MONTHLY HOUSING FINANCE COMMITMENTS
Seasonally adjusted



Seasonally adjusted commitments for housing finance increased for the second consecutive month in February 1990 with an increase over January of $105.3 million or 6.9 per cent.

February was a good month for permanent building societies which increased their commitments (in seasonally adjusted terms) by nearly 40 per cent over January. This compares with a 5.3 per cent increase for banks and a decrease of 8.7 per cent for other lenders.

The figures for both banks and building societies remain substantially (15.3% and 12.1% respectively) below home lending levels of 12 months earlier.

Trend estimates for the number of dwellings financed indicate that the decline since May 1988 may have bottomed in September 1989 following small increases for October and November 1989. Trend estimates for more recent months are not reliable enough for publication.

Banks have confirmed that fixed interest loans continued to be popular in February.

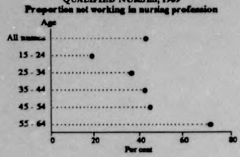
HOUSING FINANCE COMMITMENTS, FEBRUARY 1990
Seasonally adjusted

		Percentage change from	
Type of lender	*$ million*	*Previous month*	*Corresponding month of previous year*
Banks	1306.5	5.3	−15.3
Permanent building societies	190.7	39.4	−12.1
Other lenders	144.8	−8.7	44.3
Total commitments	*1642.1*	*6.9*	*−11.7*

For further information, order the publication Housing Finance for Owner Occupation, Australia *(5609.0), or contact Pat Fitzgerald on (06) 252 7117.*

Where are our qualified nurses?

QUALIFIED NURSES, 1989
Proportion not working in nursing profession



A national survey has found that 43 per cent of qualified nurses aged 15 to 64 were not working in the nursing profession. Some 8 per cent had not worked in nursing in Australia since qualifying.

The 1989 survey showed that, of the 332,900 persons who had qualified at some time as either a registered or enrolled nurse, 23 per cent were working outside the nursing profession and 20 per cent were not working. The chart shows how the proportion of nurses not working in the profession rises with age.

Of the qualified nurses who had left nursing (that is, they had worked in nursing after registering, but were not working in nursing at the time of the survey), an estimated 50,800 (44%) had left because of family responsibilities. More than half of those who had left would consider returning given a change in their circumstances.

Almost 40 per cent of qualified nurses working outside the nursing profession still held current registration as either registered or enrolled nurses.

There were an estimated 189,400 qualified nurses working in the nursing profession — 141,800 as registered nurses, 37,200 as enrolled nurses and 10,400 in other occupations.

Almost 140,000 qualified nurses have had a break of 12 months or more from nursing since registering with an Australian nursing board, but subsequently returned to nursing.

The table below shows the number of qualified nurses in comparison with population estimates across States of usual residence.

QUALIFIED NURSES, 1989

	Number of nurses ('000)		*Nurses per thousand of the population*	
	All nurses	*Those currently in nursing*	*All nurses*	*Those currently in nursing*
New South Wales	105.4	61.3	18	11
Victoria	93.5	56.2	22	13
Queensland	48.5	25.8	17	9
South Australia	33.0	18.3	23	13
Western Australia	36.1	18.6	23	12
Tasmania	6.9	4.7	15	10
Australia	*332.9*	*189.4*	*20*	*11*

For further information, order the publication Career Paths of Qualified Nurses, Australia *(6277.0), or contact Michael de Mamiel on (06) 252 6504.*

All the week's releases:
25 April to 1 May

General

Information Paper: ASCO—Australian Standard Classification of Occupations, 1990 (1221.0; free)

Statistics Weekly, 26 April 1990 (1318.0; $3.50)

Monthly Summary of Statistics, NSW, April 1990 (1305.1; $12.50)

Economic Indicators, NSW, April 1990 (1307.1; $3.30)

Monthly Summary of Statistics, Qld, April 1990 (1304.3; $8.00)

Monthly Summary of Statistics, SA, April 1990 (1303.4; $8.00)

Demography

Estimated Resident Population of Statistical Local Areas, NSW, June 1988 and 1989, Preliminary (3210.1; $8.10)

Social statistics

Pre-Schools and Child Care Centres, Qld, 1989 (4202.3; $8.00)

National accounts, finance and foreign trade

Australian National Accounts: Historical Estimates, September to December 1989 (5207.0; $12.50) — *final issue*

Foreign Investment, Aust., December Qtr 1989 (5306.0; $15.00)

Exports, Aust., Monthly Summary Tables, January 1990 (5432.0; $8.00)

Cash Management Trusts, Aust., March 1990 (5635.0; $3.30)

Labour statistics and prices

The Labour Force, Aust., March 1990 (6203.0; $13.00)

Annual and Long-service Leave Taken, Aust., May 1988 to April 1989 (6317.0; $11.50)

Export Price Index, Aust., February 1990 (6405.0; $5.00)

Price Index of Materials Used in Building Other Than House Building, Eight Capital Cities, February 1990 (6407.0; $9.00)

Price Index of Materials Used in House Building, Six State Capital Cities and Canberra, February 1990 (6408.0; $3.75)

Price Indexes of Materials Used in Coal Mining, Aust., February 1990 (6415.0; $5.00)

Agriculture

Agricultural Industries, Structure of Operating Units, Aust., March 1989 (7102.0; $15.00)

Livestock and Livestock Products, Qld, 1988–89 (7221.3; $12.50)

Secondary industry and distribution

Production Statistics, Aust., March 1990, Preliminary (8301.0; $5.00)

Building Activity, NSW, December Qtr 1989 (8752.1; $8.10)

Dwelling Unit Commencements Reported by Approving Authorities, Qld, January 1990 (8741.3; $5.00)

Building Approvals, NT, March 1990 (8731.7; $5.50)

Transport

Shipping and Air Cargo Commodity Statistics, Aust., June Qtr 1989 (9206.0; $12.50)

Registrations of New Motor Vehicles, Aust., March 1990, Preliminary (9301.0; $4.00)

Motor Vehicle Registrations, Vic., March 1990 (9303.2; $6.00)

Motor Vehicle Registrations, WA, March 1990 (9303.5; $5.50)

Road Traffic Accidents Involving Casualties, Tas., 1989 (9406.6; $8.00)

Inquiries

The ABS supplies a wide range of statistical information:

- through its bookshops
- by mail order (including subscription)
- by facsimile
- electronically.

To order any of the publications that appear in *Statistics Weekly* or to inquire about the statistics and services available from the ABS, contact Information Services at any of the offices listed below. An Information Consultancy Service in each office provides assistance of a more extensive or complex nature.

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Any suggestions for improvement to this publication should be addressed to:

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Editor
Statistics Weekly
(06) 252 6917

Calendar of key releases

Expected releases over the fortnight to 15 May 1990

2

Consumer Price Index, Australia, March Qtr 1990 (6401.0; $10.00)

Price Indexes of Materials Used in Manufacturing Industries, Australia, February 1990 (6411.0; $8.50)

Price Indexes of Articles Produced by Manufacturing Industry, Australia, February 1990 (6412.0; $6.00)

3

Balance of Payments, Australia, March 1990 (5301.0; $12.00)

Building Approvals, Australia, March 1990 (8731.0; $8.50)

10

The Labour Force, Australia, April 1990, Preliminary (6202.0; $8.50)

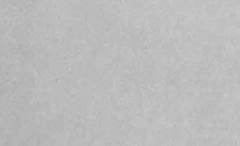
The latest ...

Changes to key State indicators — consolidated to 1 May 1990

	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Aust.
	— Percentage change from same period previous year —								
New capital expenditure (Sept. qtr 89)*	15.9	24.8	15.2	0.0	45.4	– 26.7	n.a.	n.a.	20.0
Retail turnover (Feb. 90) (trend estimate)	8.1	7.9	9.6	4.7	6.2	7.1	n.a.	8.0	7.8
New motor vehicle registrations (Mar. 90)*	7.4	29.5	3.0	6.8	– 8.3	n.a.	– 4.6	29.1	11.7
Number of dwelling unit approvals (Feb. 90)	– 27.2	– 25.7	– 28.8	6.8	– 29.8	11.9	30.2	30.4	– 23.8
Value of total building work done (Dec. qtr)	20.3	13.7	15.6	23.4	24.1	9.1	15.9	5.6	17.6
Employed persons (March 90)*	2.6	3.1	5.3	1.3	2.8	7.7	– 6.1	2.6	3.1
Capital city consumer price index (Dec. qtr 89)	7.4	8.5	7.7	7.5	7.8	7.4	7.5	6.5	7.8
Average weekly earnings (full-time adult ordinary time) (November 89)	7.9	6.8	3.7	6.9	6.4	4.7	7.6	4.6	6.6
Population (Sept. 89)	0.9	1.2	3.2	1.0	2.9	0.8	0.0	1.7	1.6
Guest nights in licensed hotels and motels, etc (Sept. qtr 89)	– 8.5	19.0	– 24.5	13.8	4.5	– 6.6	2.1	– 6.7	– 7.9

* Seasonally adjusted for States (but not Territories)

UNEMPLOYMENT RATE
Seasonally adjusted
March 1990



The latest ...

Key national indicators – consolidated to 1 May 1990

		Period	*Latest figure available* Original	*Latest figure available* Seasonally adjusted	*Percentage change (a) on* Previous period	*Percentage change (a) on* Corresponding period last year
National production						
Gross domestic product — current prices	$m	Dec. qtr 89	98,703	91,531	0.9	10.8
— *1984–85 prices*	"	"	*69,796*	*64,190*	*– 0.2*	*4.2*
Industrial activity						
New capital expenditure — current prices	$m	Dec. qtr 89	7,807	7,148	– 2.9	4.4
— *1984–85 prices*	"	"	*5,903*	*5,420*	*– 4.6*	*–0.1*
Expected new capital expenditure	"	Six months to June 90	14,967	n.a.	n.a.	5.6
Retail turnover — current prices	"	Feb. 90	6174	7015	0.7	8.7
— *1984–85 prices*	"	*Dec. qtr 89*	*16,697*	*14,831*	*0.2*	*3.7*
New motor vehicle registrations	no.	Mar. 90	62,172	57,566	8.8	11.7
Dwelling unit approvals (f)	"	Feb. 90	11,087	11,948	5.0	– 23.8
Value of all building approvals (f)	$m	"	1,981	2,398	– 15.5	– 3.9
Value of total building work done — current prices	"	Dec. qtr 89	8,109	7,741	– 0.4	17.7
— *1984–85 prices*	"	"	*5,248*	*5,010*	*– 2.3*	*6.5*
Manufacturers' sales	"	Dec. qtr 89	37,329	35,539	3.1	9.9
Expected manufacturers' sales	"	Six months to June 90	71,716	n.a.	n.a	9.7
Labour						
Employed persons	'000	Mar. 90	7,877.5	7,816.9	– 0.5	3.1
Unemployment rate †	%	"	6.5	6.1	– 0.4	– 0.2
Participation rate †	"	"	63.9	63.1	– 0.6	0.7
Job vacancies	'000	Feb. 90	60.9	56.1	– 15.0	– 15.9
Average weekly overtime per employee	hours	"	1.4	1.4	– 8.7	– 3.5
Prices, profits and wages						
Consumer price index (e)	1980–81 = 100.0	Dec. qtr 89	200.7	n.a.	1.9	7.8
Price index of materials used in manufacturing industries (e)	1984–85 = 100.0	Jan. 90	119.2	n.a.	0.8	7.8
Price index of articles produced by manufacturing industry(e)	1968–69 = 100.0	Jan. 90	559.8	n.a.	0.4	6.9
Company profits before income tax	$m	Dec. qtr 89	5,575	4,523	– 1.0	15.0
Average weekly earnings (Full-time adults; ordinary time)	$	Nov. 89	516.60	n.a.	1.6	6.6
Interest rates (b) (monthly average)						
90-day bank bills †	% per annum	Feb. 90	16.25	n.a.	– 0.4	– 0.7
10-year Treasury bonds †	"	"	13.30	n.a.	0.5	– 0.4
Balance of payments						
Exports of merchandise (f)	$m	Feb. 90	3,760	3,973	4.0	8.2
Imports of merchandise (f)	"	"	3,808	4,044	12.4	– 2.5
Balance on merchandise trade (c) (f)	"	"	– 48	– 71	91.1	74.1
Balance of goods and services (c) (f)	"	"	– 204	– 414	63.7	25.3
Balance on current account (c) (f)	"	"	– 1,189	– 1,370	32.2	– 1.1
Terms of trade (d)	1984–85 = 100.0	Dec. qtr 89	n.a.	108.4	0.6	1.7
Foreign investment						
Net foreign debt	$m	31 Dec. 89	117,399	n.a.	3.3	18.2
Net foreign liabilities	"	"	160,444	n.a.	3.4	20.7
Exchange rates (monthly average)						
$US	per $A	Feb. 90	0.7598	n.a.	– 2.9	– 11.3
Trade weighted index	May 1970 =100.0	"	58.6	n.a.	– 3.0	– 8.4
Other indicators						
Population (resident at end of qtr)	million	Sept. 89	16.9	n.a.	0.3	1.5
Overseas visitors	'000	Jan. 90	176	184	9.9	6.9

(a) Based on seasonally adjusted figures where available. (b) *Source:* Reserve Bank of Australia. (c) For percentage changes, a minus sign indicates an increase in the deficit; no sign means a decrease in the deficit or an increase in the surplus. (d) The ratio of the price of goods and services for exports to that for imports. (e) Later figures released Wednesday, 2 May 1990. (f) Later figures released Thursday, 3 May 1990.
NOTES: † = change is shown in terms of percentage points. n.a. = not available.

Figures have been taken from a variety of ABS publications. Copies may be obtained from Information Services (see page 10).
Some of the figures shown are preliminary, some final, and some are revisions of previously published figures. Users should check the latest relevant publication or with the ABS Information Services if the status of the statistic is important.

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